



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

First and Final Report and Petition for Final Distribution on Waiver of Accounting

DOD: 12/22/2001		LISA A. BOWIE , Executor, is petitioner.		NEEDS/PROBLEMS/COMMENTS:	
		Accounting is waived.		1. #5 of the Inventory and Appraisal is not complete regarding the property tax certificate. Need property tax certificate. 2. Need Order. Local Rule 7.1 states a proposed Order shall be submitted with all pleadings that request relief. If the proposed order is not received in the Probate Filing Clerk's Office ten (10) days before the scheduled hearing, a continuance may be required.	
		I & A - \$100,000.00			
		POH - \$100,000.00			
Cont. from					
	Aff.Sub.Wit.				
✓	Verified	Executor - waives			
✓	Inventory	Attorney - waives			
	PTC				
	Not.Cred.	Costs - \$853.00 (filing fees, publication)			
✓	Notice of Hrg				
✓	Aff.Mail	W/	Distribution, pursuant to decedent's will, is to:		
	Aff.Pub.		Lisa A. Bowie – 100% interest in the real property		
	Sp.Ntc.				
	Pers.Serv.				
	Conf. Screen				
✓	Letters	9/11/01			
	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
✓	9202				
	Order	X			
	Aff. Posting				
	Status Rpt				
	UCCJEA				
	Citation				
✓	FTB Notice				
				Reviewed by: KT	
				Reviewed on: 2/18/14	
				Updates:	
				Recommendation:	
				File 1 – Mike	

Atty Keeler, William J.

Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

NEEDS/PROBLEMS/COMMENTS:

OFF CALENDAR

Discovery matters are under review and will be heard by the Discovery Referee pursuant to Court order.

Reviewed by: skc

Reviewed on: 2-18-14

Updates:

Recommendation:

File 4A – McCann

(1) Waiver of Accounting and (2) Petition for Allowance of Statutory Fees to
Executor, and (3) Petition for Final Distribution

DOD: 04/22/13		GAYLE BARTON , Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Accounting is waived.	<u>CONTINUED FROM 02/03/14</u>
Cont. from 022414		I & A - \$370,000.00	
<input type="checkbox"/>	Aff.Sub.Wit.	POH - \$370,000.00	
<input checked="" type="checkbox"/>	Verified	Executor - \$10,400.00 (statutory)	
<input checked="" type="checkbox"/>	Inventory	Attorney - \$5,000.00 (less than statutory)	
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	Distribution, pursuant to decedent's will, is to:	
	Aff.Pub.	Gayle Barton, Trustee of the Michael B. Ekizian Declaration of Trust - \$370,000.00	
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters	08/05/13	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
<input checked="" type="checkbox"/>	9202		Reviewed by: JF
<input checked="" type="checkbox"/>	Order		Reviewed on: 02/18/14
	Aff. Posting		Updates:
	Status Rpt		Recommendation: SUBMITTED
	UCCJEA		File 5 – Ekizian
<input checked="" type="checkbox"/>	FTB Notice		

First-Amended Petition for Instructions and to Determine Entitlement

Edith DOD: 3-12-12	CLARENCE DALE STEVENS is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Sam DOD: 9-27-97		
	<p>Petitioner states he is the named successor trustee and beneficiary of the Edith Lillian Mitchell Stevens Revocable Living Trust dated 11-2-83, as amended 5-4-04, 5-9-07, and 2-11-08. Attached to the petition are the trust and the 2nd and 3rd amendments. Petitioner states the 1st amendment has been irretrievably lost or stolen, but its non-existence is of no legal or factual consequence, as the terms, conditions, and instructions under which the trust is to be administered and distributed are more than adequately described in the 2nd and 3rd amendments.</p> <p>Petitioner states Sam C. Stevens and Edith Lillian Mitchell Stevens were once married and residing in the County of Fresno. They had four children of the marriage: Robert Duane Stevens; Betty Lou Amelino; Larry Bryan Stevens; and Clarence Dale Stevens (Petitioner).</p> <p>Sam and Lillian wrote two revocable living trusts during their marriage to address their estate planning needs and desires. Sam's trust dated 11-2-83 is also attached for reference. Petitioner notes the "reciprocal provisions" of Sam's and Edith's trusts.</p> <p>Petitioner states that the two trusts told title to multiple parcels of real property in both Fresno County and within the State of California and a promissory note secured by real property in Torrance, CA, said property being vested in the name of Betty Lou Amelino.</p> <p>Petitioner states there is no ambiguity in the writings created by Edith prior to her death, and that Petitioner is the unquestioned successor trustee of her trust under the 3rd Amendment dated 2-11-08.</p> <p>A dispute has arisen between the beneficiaries and trustees of the two trusts.</p> <p><u>SEE ADDITIONAL PAGES</u></p>	<p>1. <u>As previously noted:</u> Notice to certain beneficiaries was sent "C/O" other persons. However, <u>direct</u> notice to the person entitled thereto is required by Cal. Rules of Court 7.51 (<u>even to a minor or a conservatee</u>), and notice to the attorney, if represented, is required by Probate Code §1214. The Court may require continuance for proper notice (30 days' direct notice) to all persons entitled to notice, as noted above.</p> <p>Specifically, notice to Betty Lou Amalino was sent "C/O" Public Guardian, rather than directly, as previously noted.</p> <p>Also, notice to <u>Robert Stevens</u> was previously sent to his attorney. This time, notice was sent to him "C/O" Shari Ann Stevens, with the attorney excluded.</p> <p>2. Need order.</p>
Cont. from 121613		
Aff.Sub.Wit.		
✓ Verified		
Inventory		
PTC		
Not.Cred.		
✓ Notice of Hrg		
✓ Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order	X	
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Page 2

Petitioner states that on 10-10-13, Robert Stevens filed an unlawful detainer action against petitioner 13CECL09482 seeking to evict Petitioner from real property located at 19760 E. American Avenue, Reedley, CA 93654 (APN 333-290-13). See deed at Exhibit H. (Deed dated 1983 indicates that Sam and Edith granted this property in one-half undivided interests to each of their respective trusts.) Petitioner submits that is beyond dispute that title to this real property is vested as such.

Petitioner believes the UD action initiated by Robert Stevens was brought against Petitioner with an intent to vex, annoy, harass, and needlessly impose financial punishment upon Petitioner, and the Court must issue instructions and make findings confirming Petitioner as the proper successor trustee of Edith's trust, as amended, or a multiplicity of separate but related legal actions will ultimately be filed between the interested parties to each of the trusts.

Petitioner requests the following:

1. **An adjudication, finding, and instruction from the Court that, under operation of the 3rd Amendment dated 2-11-08, Petitioner is confirmed as the due, proper, and only successor trustee of the Edith Lillian Mitchell Stevens Revocable Living Trust dated 11-2-83 as amended 5-4-04, 5-9-07, and 2-11-08;**
2. **An adjudication, finding, and instruction from the Court that the 3rd Amendment is in full force and effect;**
3. **An adjudication, finding, and instruction from the Court that the 3rd Amendment controls and instructions Petitioner as successor trustee how the trust estate contained within the trust shall be distributed; and**
4. **That the Court order such other and further relief as it may deem proper.**

Atty Pape, Jeffrey B., of Pape & Shewan (for Petitioner Ronald Snyder, Trustee)

Petition for Order Accepting Resignation of Trustee and for Appointment of Successor Trustee

			RONALD SNYDER , Trustee of MARGARET WENTWORTH TESTAMENTARY TRUST , is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
			Petitioner states:	
			<ul style="list-style-type: none"> He was duly appointed as Trustee of the MARGARET WENTWORTH TESTAMENTARY TRUST by Order of the Court dated 2/8/1991 (<i>copy of Order attached as Exhibit A</i>); Petitioner serves as Trustee without bond; Petitioner has tendered his resignation as Trustee, and Petitioner requests that his resignation be accepted; (<i>Resignation attached as Exhibit B</i>); As there is no successor trustee nominated in the Order, Petitioner requests that BRUCE D. BICKEL, a private professional trustee, be appointed as successor trustee; (<i>Acceptance of Appointment as Trustee attached as Exhibit C</i>); The Trust estate consists of one asset which is cash in the amount of \$109,816.81. 	1. Probate Code § 15602(a)(3) provides a trustee is not required to give a bond unless an individual who is not named as trustee in the trust instrument is appointed as trustee by the court. Subdivision (b) provides that a request by all adult beneficiaries of a trust that bond be waived for the individual not named as trustee in the trust is deemed to constitute a compelling circumstance sufficient for the court to excuse requirement of bond. <i>Petition</i> is silent on the issue of bond for the successor trustee, and none of the beneficiaries have requested or consented to waiver of bond.
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W/		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Petitioner requests:	
			1. The Court accept Petitioner's resignation; 2. The Court appoint BRUCE D. BICKEL as Successor Trustee of the MARGARET WENTWORTH TESTAMENTARY TRUST created under Order dated 2/8/1991; 3. Petitioner Ronald Snyder be directed to transfer the Trust assets to BRUCE D. BICKEL ; and 4. On acknowledge of receipt of Trust assets by BRUCE D. BICKEL , the Court discharge Petitioner Ronald Snyder, as Trustee, from all duties and responsibilities as Trustee of the MARGARET WENTWORTH TESTAMENTARY TRUST created under Order dated 2/8/1991.	Note: Order dated 2/8/1991 in Case #4057394 from the ESTATE OF MARGARET WENTWORTH finds the estate residue shall be distributed to Petitioner in trust for EVERETT ALLEN WENTWORTH, JR. for his lifetime; upon his death, the trust property shall be distributed in specific percentages to the Petitioner, ROSEANN MACSWAIN , and JERRY DALE SNYDER .
				Reviewed by: LEG
				Reviewed on: 2/18/14
				Updates:
				Recommendation:
				File 7 – Wentworth

9 **Helen M. Davalos aka Helen Margaret Davalos aka Helen Margaret Mulleneaux (Estate)** **Case No. 14CEPR00043**

Atty Jaech, Jeffrey A. (for Wendy M. Carlos – Petitioner)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 01/03/14			WENDY M. CARLOS , daughter/named Executor without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from			Full IAEA – OK	
	Aff.Sub.Wit.	s/p	Will dated 03/26/99	
✓	Verified			
	Inventory		Residence: Fresno	
	PTC		Publication: The Business Journal	
	Not.Cred.			
✓	Notice of Hrg		Estimated Value of the Estate:	
✓	Aff.Mail	w/o	Personal property - \$ 60,000.00	
	Aff.Pub.		Annual income - 500.00	
	Sp.Ntc.		Real property - 169,000.00	
	Pers.Serv.		Total - \$229,500.00	
	Conf. Screen			
✓	Letters		Probate Referee: RICK SMITH	
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCC/JEA			
	Citation			
	FTB Notice			

Note: Status hearings will be set as follows:

- Friday, 07/25/14 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and
- Friday, 04/24/15 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter, the status hearing will come off calendar and no appearance will be required.

Reviewed by: JF

Reviewed on: 02/18/14

Updates:

Recommendation: SUBMITTED

File 9 – Davalos

Petition for Appointment of Temporary Guardianship of the Person

Raul, 14		<p align="center"><u>GENERAL HEARING 04/14/14</u></p> <p>MARIA BAUTISTA JUAREZ, maternal grandmother, is Petitioner.</p> <p>Father: RAUL SALVADOR ANDRES LOPEZ Mother: KARLA LILIANA JUAREZ BAUTISTA</p> <p>Paternal grandfather: RAUL ANDRES RIVAS Paternal grandmother: MANUELA DEL CARMEN LOPEZ DE ANDRES</p> <p>Maternal grandfather: ALEJANDRO JUAREZ</p> <p>Petitioner states that the minor's father lives in Canada and the mother lives in El Salvador. Petitioner is willing to provide them with housing, care and maintenance. There is no adult willing to care for the minors. Temporary guardianship is needed in the event of an emergency and for the children's educational needs/issues.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i>. 2. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Temporary Petition</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: <ol style="list-style-type: none"> a. Raul Salvador Andres Lopez (father) b. Karla Liliana Juarez Bautista (mother) Note: Notarized statement from mother, does not excuse personal service requirement. Need mother's signature on Consent & Waiver of Notice. 	
Odalys, 12				
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			x
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			x
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
<p>Reviewed by: JF</p> <p>Reviewed on: 02/18/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 10 – Juarez</p>				

Petition for Visitation

Age: 29		<p>IRENE HOLGUIN, mother, is Petitioner.</p> <p>JUDY MATHIS, foster mother/friend, was appointed conservator of the person on 1/7/03.</p> <p>Petitioner states that she has complied with the previous court ordered visitation since 2011 and would now like to increase the visitation from 8:00am Saturday morning to 8:00pm Sunday evening and to include every legal holiday.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Per minute order dated 08/03/11, Irene Holguin currently has unsupervised visitation every Sunday from 8:00am to 6:00pm.</p>	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			w/
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order	x		
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: JF	
			Reviewed on: 02/18/14	
			Updates:	
			Recommendation:	
			File 11 – Castro	

ProPer Augustus, Carolyn (pro per – biological paternal grandmother/Petitioner)
 Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Anquan, 7		<p align="center"><u>NO TEMPORARY REQUESTED</u></p> <p>CAROLYN AUGUSTUS, biological paternal grandmother, is Petitioner.</p> <p>Biological Father: ANTWANE DUPREE LEE – personally served on 01/21/14</p> <p>Biological Mother: DEREICE DRAPER Adoptive mother/maternal aunt: JAVON WALDROP</p> <p>Paternal grandfather: DECEASED</p> <p>Maternal grandfather: CLOYD LEE MARSHALL Maternal grandmother: DECEASED</p> <p>Petitioner alleges that the children are not being properly cared for in their current home. Their medical and dental needs are neglected, they are underfed, and do not have adequate clothing. The ragged clothes they do have are unclean and their hygiene is poor. The children have no beds and sleep on a dirty floor sometimes without covers.</p> <p>Court Investigator Dina Calvillo filed a report on 02/14/14.</p> <p>DSS Social Worker Irma Ramirez filed a report on 02/14/14.</p> <p>Objection to Guardianship filed 02/18/14 by Javon Waldrop states that Petitioner, Carolyn Augustus has made false allegations against her. Objector believes that Ms. Augustus is angry because her visitation was stopped. Objector states that she stopped allowing Ms. Augustus to visit the children because of the false allegations.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED FROM 02/18/14 Minute Order from 02/18/14 states: Court Investigator Dina Calvillo is sworn and testifies. The Court orders that Carolyn Augustus take part in the DSS Team Decision Meeting. Javon Waldrop is ordered to provide before the next hearing, proof that the children are enrolled and attending school.</p> <ol style="list-style-type: none"> Need proof of service at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: <ol style="list-style-type: none"> Javon Waldrop (adoptive mother/biological maternal aunt) – personal service required Cloyd Lee Marshall (maternal grandfather) – service by mail is sufficient Items 3 & 13 of the Confidential Screening Form were not completed. #3 – I have/have not been charged with, arrested for, or convicted of a crime deemed to be a felony or a misdemeanor; #13 – I have or may have/I do not have an adverse interest that the court may consider to be a risk to, or to have an effect on, my ability to faithfully perform the duties of guardian. 	
Anquanesse, 7				
Cont. from 021814				
<input type="checkbox"/>	Aff.Sub.Wit.			
✓	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
✓	Notice of Hrg			
<input type="checkbox"/>	Aff.Mail			X
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
✓	Pers.Serv.			w/o
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
✓	Objections			
<input type="checkbox"/>	Video Receipt			
✓	CI Report			
<input type="checkbox"/>	9202			
✓	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
✓	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			